

PolicyStat Cheatsheet

TOPIC	QUICK OVERVIEW	KNOWLEDGE BASE ARTICLE
Terminology	Common terms and topics	https://support.policystat.com/hc/en-us/articles/204880595
3 Pillars of PolicyStat	User roles and permissions Policy Areas Approval Workflows	https://support.policystat.com/hc/en-us/articles/205022789
Searching	<ul style="list-style-type: none"> Search field returns Google-like search results. Tabs are filters to narrow search results. 	https://support.policystat.com/hc/en-us/articles/204864415
User Notifications	<ol style="list-style-type: none"> User receives email to notify need for action/review Home tab screens Notifications tab (top right) 	https://support.policystat.com/hc/en-us/articles/205071759
Approval Workflows	Sequence of users who review, edit, and approve a PolicyStat document as required by the assigned revision period or edits.	https://support.policystat.com/hc/en-us/sections/201017275
Scheduled Effective Date	Sets a delay during the period between final approval and the document becoming active.	https://support.policystat.com/hc/en-us/articles/115000238133
Policies Requiring Approval	Bulk Approve (Only if unchanged)	https://support.policystat.com/hc/en-us/sections/201017275
	Approve/Reject one by one	https://support.policystat.com/hc/en-us/articles/206404324
	Show Changes to review	https://support.policystat.com/hc/en-us/articles/204864265
Collaboration Commenting	Allow users who are not a part of the Approval Workflow to comment and suggest changes. Invite to comment requires a PolicyStat account.	https://support.policystat.com/hc/en-us/articles/204864225
Start Review / Create new version	<ol style="list-style-type: none"> Individual Review or Bulk Review Review/Edit to Make Modifications 	https://support.policystat.com/hc/en-us/articles/206404324
Create New	<ol style="list-style-type: none"> Create new document using PolicyStat editor Upload from existing Word document 	https://support.policystat.com/hc/en-us/articles/204453979
Attachments / Images	Common attachment types: Spreadsheets, PowerPoints, PDF, images	https://support.policystat.com/hc/en-us/sections/201017365

For additional help, visit support.policystat.com or contact support@policystat.com. To participate in upcoming webinars, visit <http://learn.policystat.com/lceducation/>

PolicyStat Cheatsheet (PolicyStat Editor)

TOPIC	QUICK OVERVIEW	Icon	SUPPORT SITE ARTICLE
Toolbar Overview	An overview of all current toolbar functions	N/A	https://support.policystat.com/hc/en-us/articles/210330633
Numbered Lists	Create and modify numbered lists including style options		https://support.policystat.com/hc/en-us/articles/205714909
Bulleted lists	Create and modify bulleted lists		https://support.policystat.com/hc/en-us/articles/208789226
Headings	Increased font sizes, hyperlinked headings, and numbered headings to improve lists		https://support.policystat.com/hc/en-us/articles/115002194813
Hyperlinking	Create hyperlinks to external sites, between two policies or to external pages or forms.		https://support.policystat.com/hc/en-us/articles/210667623
Add Symbol or Special Characters	Add symbols or special characters to a policy.		https://support.policystat.com/hc/en-us/articles/204863985
Insert and Format Tables	Insert new tables and use PolicyStat's formatting features to ensure the desired look and feel.		https://support.policystat.com/hc/en-us/articles/210599823

Frequently Asked Questions About Editor Topics

Editor Toolbar

<https://support.policystat.com/hc/en-us/sections/200978329>

Hyperlinks

<https://support.policystat.com/hc/en-us/sections/201340465>

Export to Word

<https://support.policystat.com/hc/en-us/articles/204495889>

For additional help, visit support.policystat.com or contact support@policystat.com. To participate in upcoming Education session, visit learn.policystat.com/lceducation/